

# Secretary of the Interior's Standards for the Treatment of Historic Properties

**Santa Clara Historical and Landmarks Commission**

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Santa Clara, California**

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# Application

- Types
- Uses
- Styles and Periods
- Sizes
- Materials



# Encompass

- Buildings
- Landscape Features
- Site
- Environment
- Districts
- Attached, Adjacent or Related New Construction



# Apply to

- Exteriors
- Interiors



SECRETARY OF THE INTERIOR'S STANDARDS FOR THE TREATMENT OF HISTORIC PROPERTIES

	Rehabilitation (1950)	Rehabilitation (1995)	Restoration (1995)	Preservation (1995)	Reconstruction (1995)
	<b>Rehabilitation</b> is defined as the act or process of making possible a compatible use for a property through repair, alterations, and additions while preserving those portions or features which convey its historical, cultural, or architectural values.	<b>Rehabilitation</b> is defined as the act or process of making possible a compatible use for a property through repair, alterations, and additions while preserving those portions or features which convey its historical, cultural, or architectural values.	<b>Restoration</b> is defined as the act or process of accurately restoring the form, features, and character of a property as it appeared at a particular period of time by means of the removal of features from other periods in its history and reconstruction of missing features from the restoration period. The limited and sensitive upgrading of mechanical, electrical, and plumbing systems and other code required work to make properties functional is appropriate within a restoration project.	<b>Preservation</b> is defined as the act or process of measures necessary to sustain the existing form, integrity, and materials of an historic property. Work involving preliminary measures to protect and stabilize the property, generally focuses upon the ongoing maintenance and repair of historic materials and features, rather than extensive replacement and new construction. New exterior additions are not within the scope of this treatment; however, the limited and sensitive upgrading of mechanical, electrical, and plumbing systems and other code required work to make properties functional is appropriate within a preservation project.	<b>Reconstruction</b> is defined as the act or process of depicting by means of new construction the form, features, and detailing of a non-surviving site, landscape, building, structure, or object for the purpose of replicating its appearance at a specific period of time and in its historic location.
1	A property shall be used for its historic purpose or be placed in a new use that requires minimal change to the defining characteristics of the building and its site and environment.	A property will be used as it was historically or be given a new use that requires minimal change to its distinctive materials, features, spaces, and spatial relationships.	A property will be used as it was historically or be given a new use that reflects the property's restoration period.	A property will be used as it was historically, or be given a new use that maintains the selection of distinctive materials, features, spaces, and spatial relationships. Where a treatment and use have not been identified, a property will be protected and, if necessary, stabilize until additional work may be undertaken.	Reconstruction will be used to depict vanished or non-surviving portions of a property when documentary and physical evidence is available to permit accurate reconstruction with minimal conjecture, and such reconstruction is essential to the public understanding of the property.
2	The historic character of a property shall be retained and preserved. The removal of historic materials or alteration of features and spaces that characterize a property shall be avoided.	The historic character of a property will be retained and preserved. The removal of distinctive materials or alteration of features, spaces, and spatial relationships that characterize a property will be avoided.	Materials and features from the restoration period will be retained and preserved. The removal of materials or alteration of features, spaces, and spatial relationships that characterize the period will not be undertaken.	The historic character of a property will be retained and preserved. The replacement of select or replaceable historic materials or alteration of features, spaces, and spatial relationships that characterize a property will be avoided.	Reconstruction of a landscape, building, structure, or object in its historic location will be precluded by a thorough and logical investigation to identify and avoid those features and artifacts which are essential to accurate reconstruction. If such resources must be disturbed, mitigation measures will be undertaken.
3	Each property shall be recognized as a physical record of its time, place, and use. Changes that create a false sense of historical development, such as adding conjectural features or architectural elements from other buildings, shall not be undertaken.	Each property will be recognized as a physical record of its time, place, and use. Changes that create a false sense of historical development, such as adding conjectural features or elements from other historic properties, will not be undertaken.	Each property will be recognized as a physical record of its time, place, and use. Work needed to stabilize, conserve and conserve materials and features from the restoration period will be physically and visually compatible, identifiable upon close inspection, and properly documented for future research.	Each property will be recognized as a physical record of its time, place, and use. Work needed to stabilize, conserve and conserve existing historic materials and features from the restoration period will be physically and visually compatible, identifiable upon close inspection, and properly documented for future research.	Reconstruction will include measures to preserve any remaining historic materials, features, and spatial relationships.
4	Most properties change over time. Those changes that have acquired historic significance in their own right shall be retained and preserved.	Changes to a property that have acquired historic significance in their own right will be retained and preserved.	Materials, features, spaces, and finishes that characterize other historic periods will be documented prior to their alteration or removal.	Changes to a property that have acquired historic significance in their own right will be retained and preserved.	Reconstruction will be based on the accurate duplication of historic features and elements substantiated by documentary or physical evidence. Other than conjectural designs or the availability of different features from other historic properties, a reconstructed property will reproduce the appearance of the non-surviving historic property in materials, design, color, and texture.

	Rehabilitation (1980)	Rehabilitation (1995)	Restoration (1995)	Preservation (1995)	Reconstruction (1995)
5	Destructive features, finishes, and construction techniques or examples of craftsmanship that characterize a property shall be preserved.	Destructive materials, features, finishes, and construction techniques or examples of craftsmanship that characterize a property will be preserved.	Destructive materials, features, finishes, and construction techniques or examples of craftsmanship that characterize the restoration period will be preserved.	Destructive materials, features, finishes, and construction techniques or examples of craftsmanship that characterize a property will be preserved.	A reconstruction will be clearly identified as a contemporary reconstruction.
6	Deteriorated historic features shall be repaired rather than replaced. Where the severity of deterioration requires replacement of a distinctive feature, the new feature shall match the old in design, color, texture, and other visual qualities and, where possible, materials. Replacement of missing features shall be substantiated by documentary, physical, or pictorial evidence.	Deteriorated historic features will be repaired rather than replaced. Where the severity of deterioration requires replacement of a distinctive feature, the new feature will match the old in design, color, texture, and, where possible, materials. Replacement of missing features will be substantiated by documentary and physical evidence.	Deteriorated features from the restoration period will be repaired rather than replaced where the severity of deterioration requires replacement of a distinctive feature, the new feature will match the old in design, color, texture, and, where possible, materials.	The existing condition of historic features will be evaluated to determine the appropriate level of attention needed. Where the severity of deterioration requires repair or limited replacement of a distinctive feature, the new material will match the old in composition, design, color, and texture.	Designs that were never executed historically will not be constructed.
7	Chemical or physical treatments, such as sandblasting, that cause damage to historic materials shall not be used. The surface cleaning of structures, if appropriate, shall be undertaken using the gentlest means possible.	Chemical or physical treatments, if appropriate, will be undertaken using the gentlest means possible. Treatments that cause damage to historic materials will not be used.	Replacement of missing features from the restoration period will be substantiated by documentary and physical evidence. A false sense of history will not be created by adding conjectural features, features from other properties, or by combining features that never existed together historically.	Chemical or physical treatments, if appropriate, will be undertaken using the gentlest means possible. Treatments that cause damage to historic materials will not be used.	
8	Significant archeological resources affected by a project shall be protected and preserved in place. If such resources must be disturbed, mitigation measures shall be undertaken.	Archaeological resources will be protected and preserved in place. If such resources must be disturbed, mitigation measures will be undertaken.	Chemical or physical treatments, if appropriate, will be undertaken using the gentlest means possible. Treatments that cause damage to historic materials will not be used.	Archaeological resources will be protected and preserved in place. If such resources must be disturbed, mitigation measures will be undertaken.	
9	New additions, exterior alterations, or related new construction shall not destroy historic materials that characterize the property. The new work shall be differentiated from the old and shall be compatible with the existing site, scale, and architectural features to protect the historic integrity of the property and its environment.	New additions, exterior alterations, or related new construction will not destroy historic materials, features, and spatial relationships that characterize the property. The new work shall be differentiated from the old and will be compatible with the historic materials, features, size, scale and proportion, and meaning to protect the integrity of the property and its environment.	Archaeological resources affected by a project will be protected and preserved in place. If such resources must be disturbed, mitigation measures will be undertaken.		
10	New additions and adjacent or related new construction shall be undertaken in such a manner that, if removed in the future, the essential form and integrity of the historic property and its environment would be unimpaired.	New additions and adjacent or related new construction will be undertaken in such a manner that, if removed in the future, the essential form and integrity of the historic property and its environment would be unimpaired.	Designs that were never executed historically will not be constructed.		

# Four Treatments

- **Preservation**
- **Rehabilitation**
- **Restoration**
- **Reconstruction**

**Codified as 36 CFR Part 68**

**Standards for Rehabilitation for purposes of  
Federal Tax benefits codified as 36 CFR Part 67**

# Reconstruction



“...depicting, by means of new construction, the form, features, and detailing of a non-surviving” property.

# Reconstruction





# Restoration

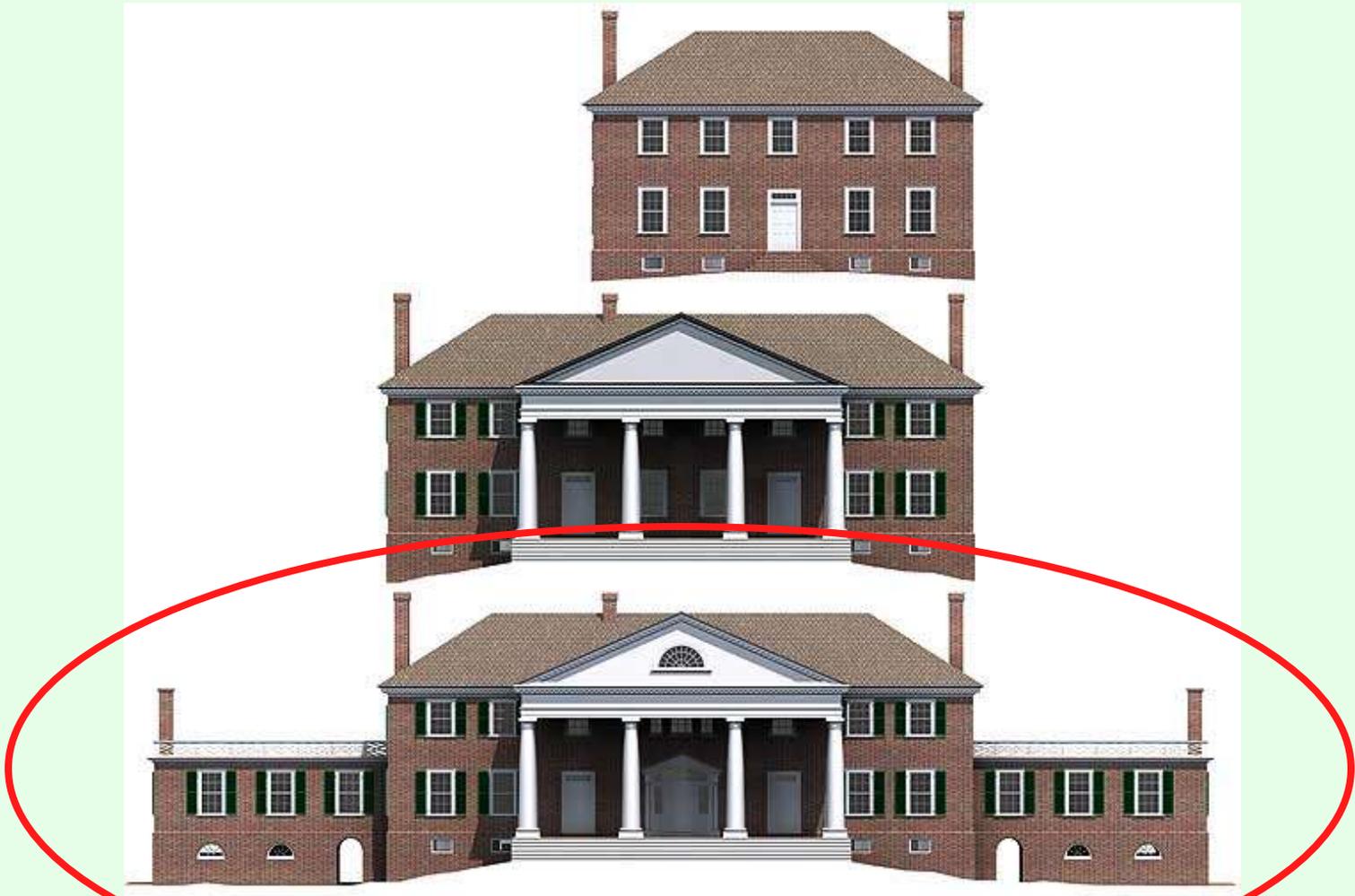
“...accurately depicting the form, features, and character of a property as it appeared at a particular period of time...”

# Restoration



# Restoration





# Preservation

“The act or process of applying measures necessary to sustain the existing form, integrity, and materials of an historic property....”



# Preservation



# Preservation





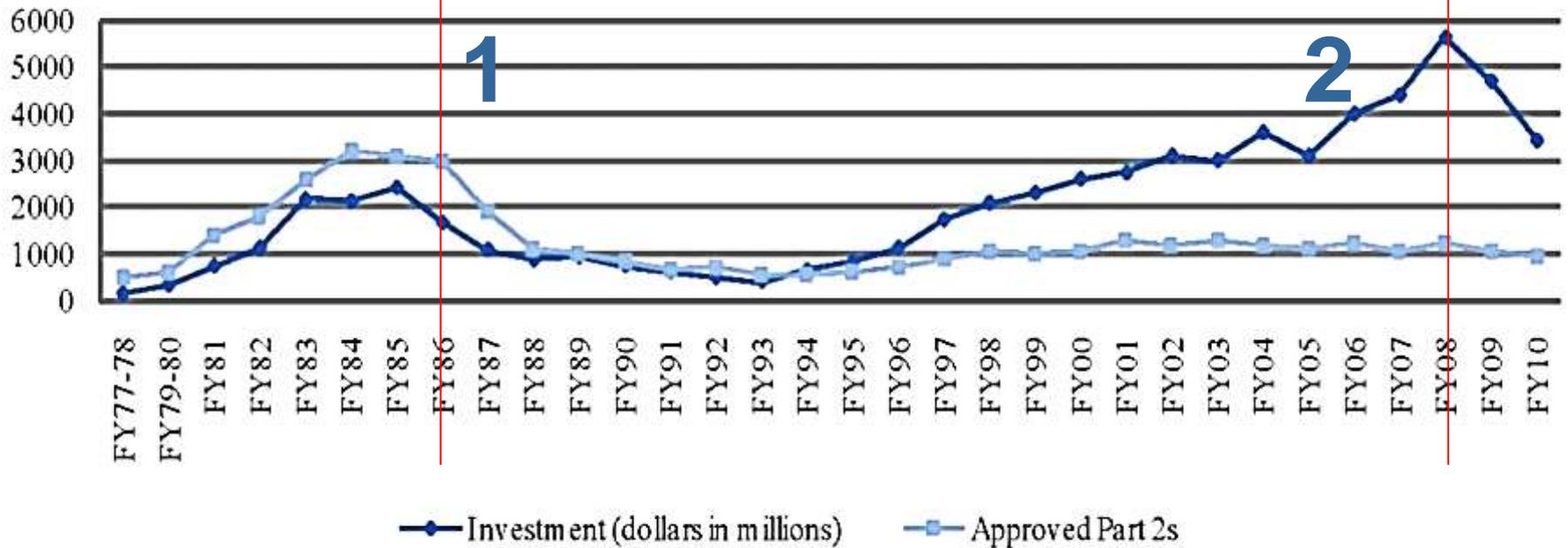
**Preservation**

# Rehabilitation

“...making possible a compatible use for a property through repair, alterations, and additions while preserving those portions or features which convey its historical... values.”

# Rehabilitation Tax Credit Project Investment 1977-2010

Federal Tax Incentives For Rehabilitating Historic Buildings, 1977-2010



## § 67.7 Standards for Rehabilitation Preamble

(a) The following Standards for Rehabilitation are the criteria used to determine if a rehabilitation project qualifies as a certified rehabilitation. The intent of the Standards is to assist the long-term preservation of a property's significance through the preservation of historic materials and features.

(b) The following Standards are to be applied to specific rehabilitation projects in a reasonable manner, *taking into consideration economic and technical feasibility*.

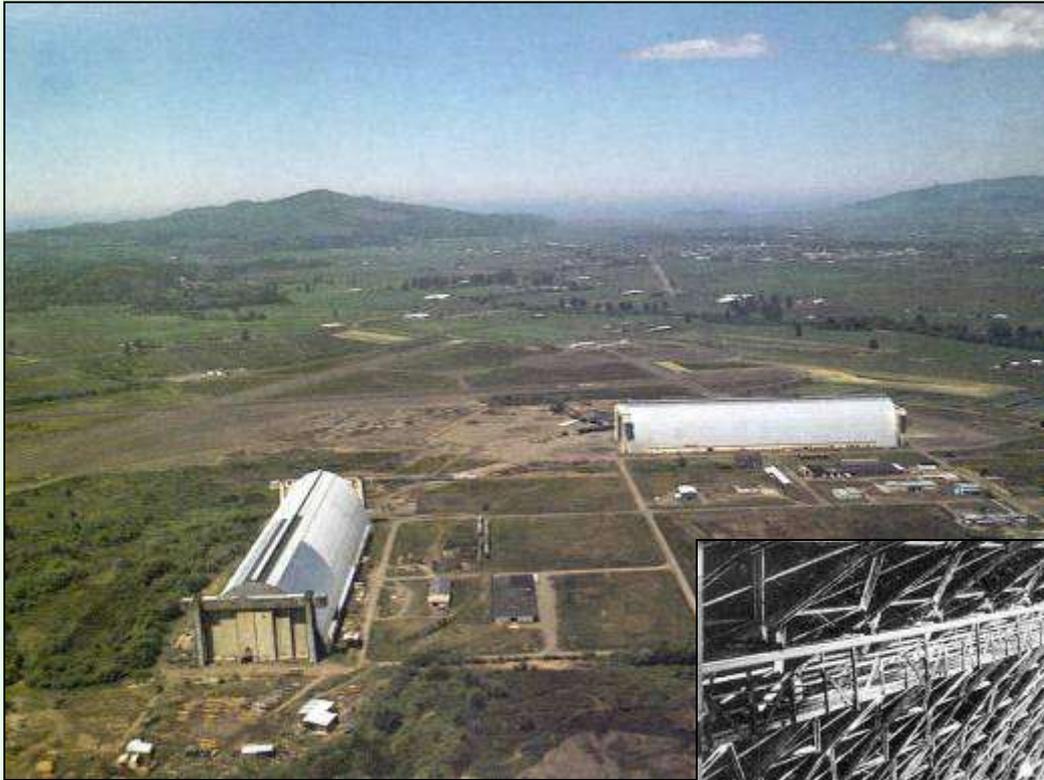
## § 68.3 Standards for Treatment Preamble

One set of standards—preservation, rehabilitation, restoration or reconstruction— will apply to a property undergoing treatment, depending upon the property's significance, existing physical condition, the extent of documentation available and interpretive goals, when applicable. The standards will be applied *taking into consideration the economic and technical feasibility* of each project.

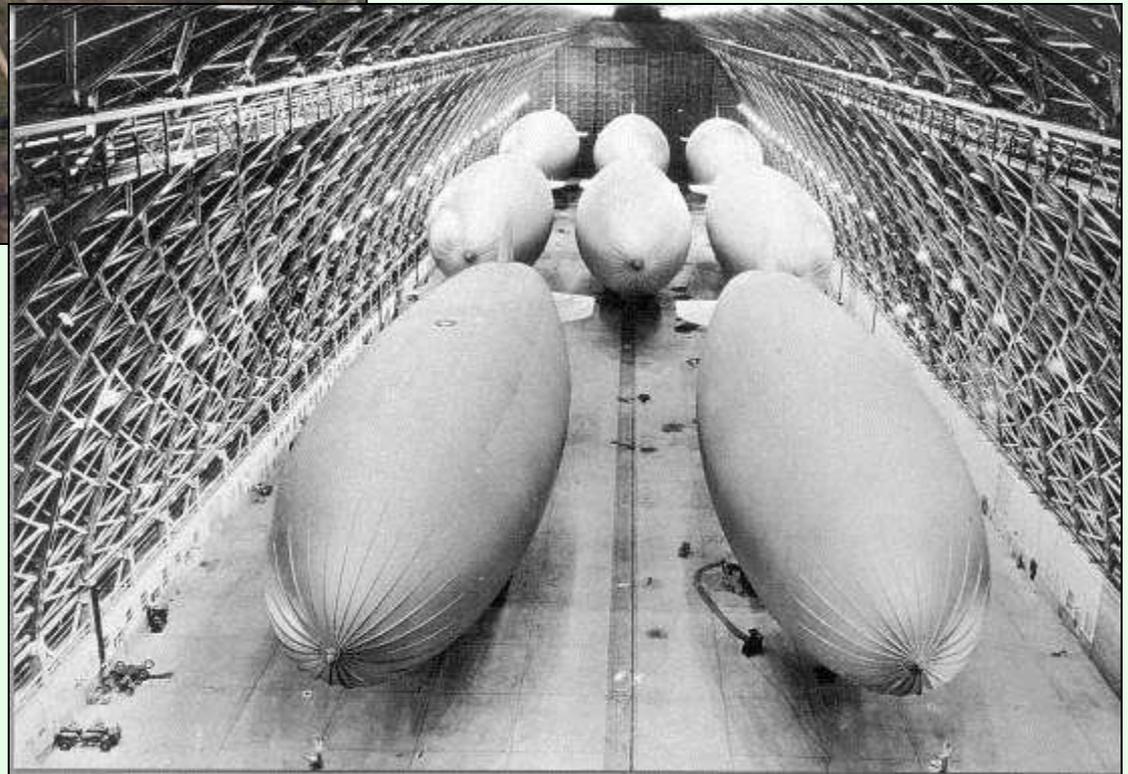
# Standard 1

## Compatible Use

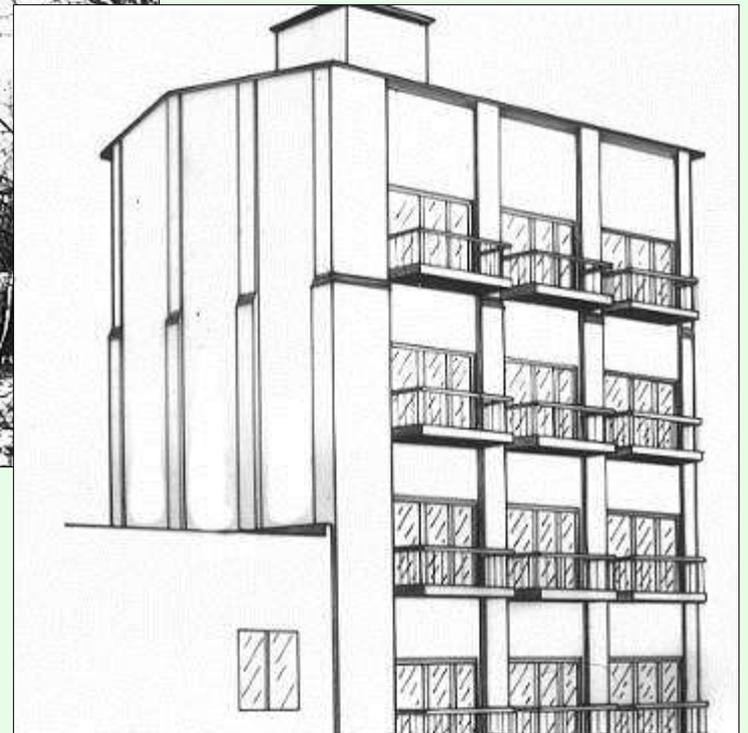
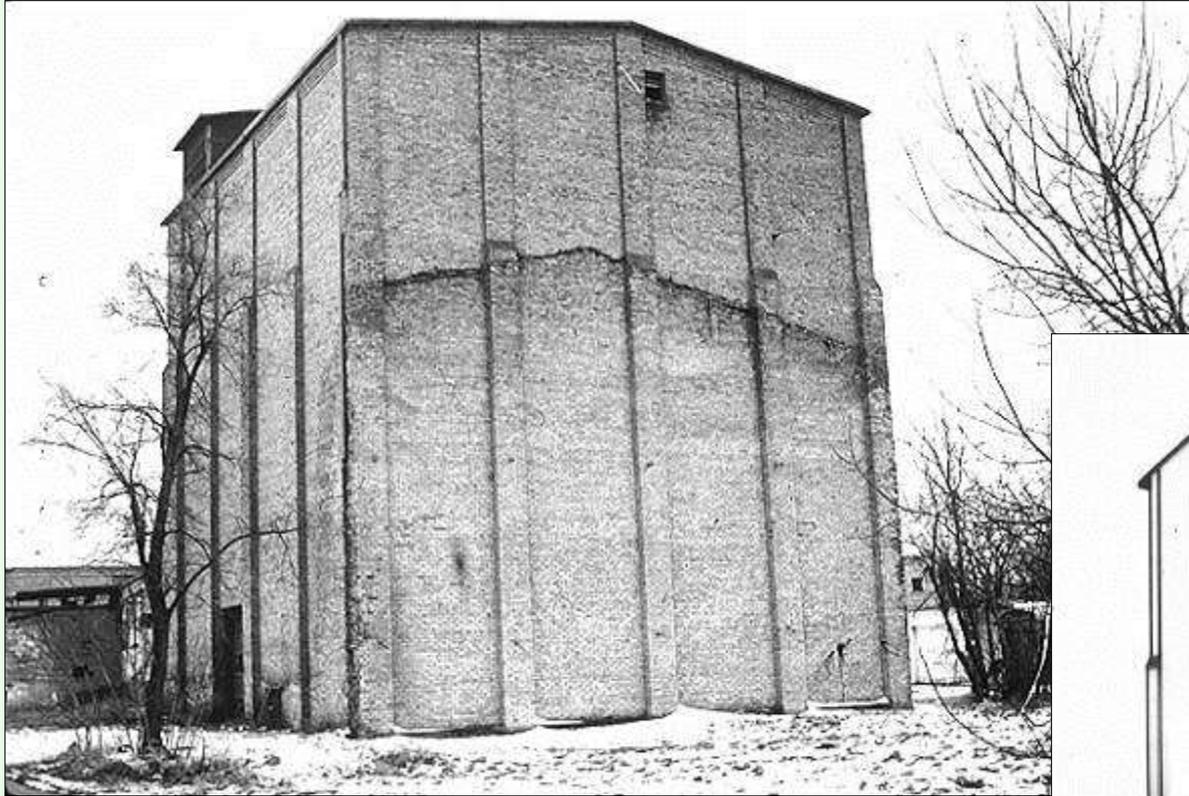




## Standard 1 - Use



# Standard 1 - Use



# Standard 1 - Use

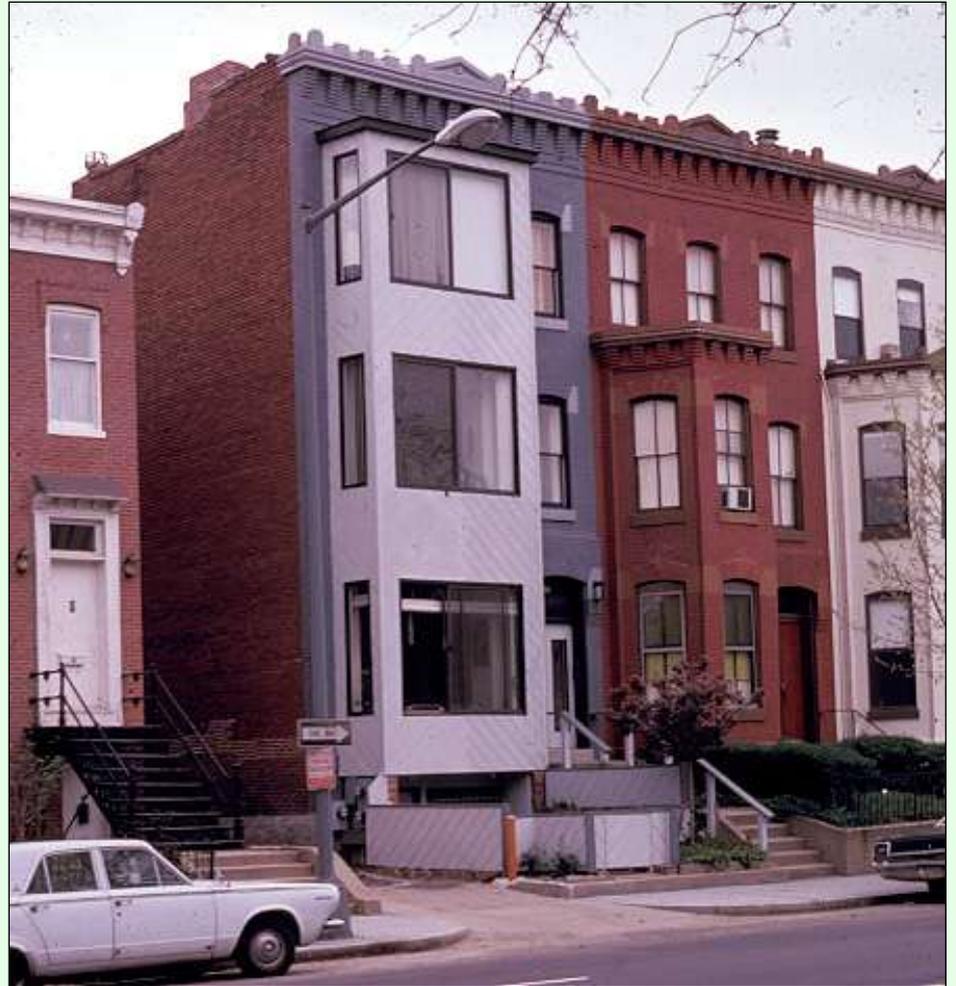




## Standard 2

**Retain and Preserve  
Historic Character**

## Standard 2 - Historic Character

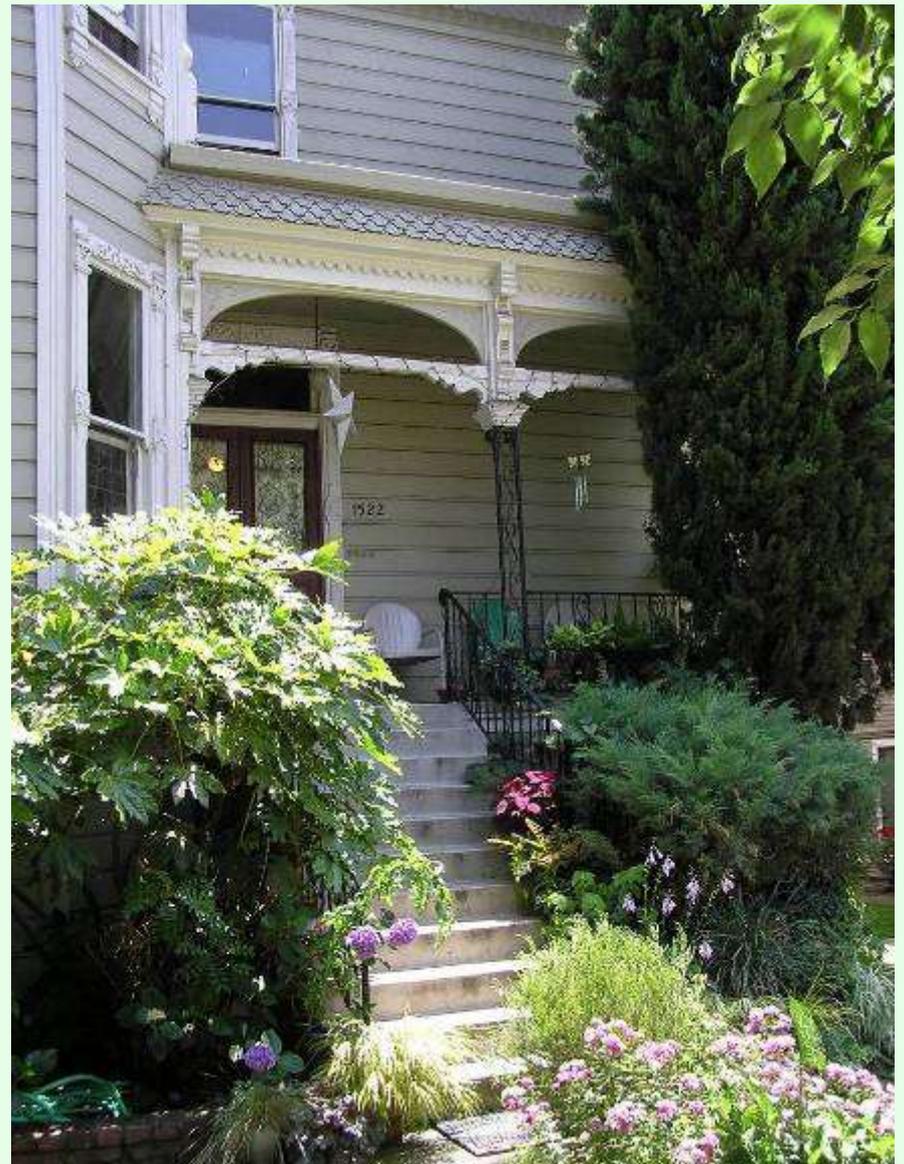


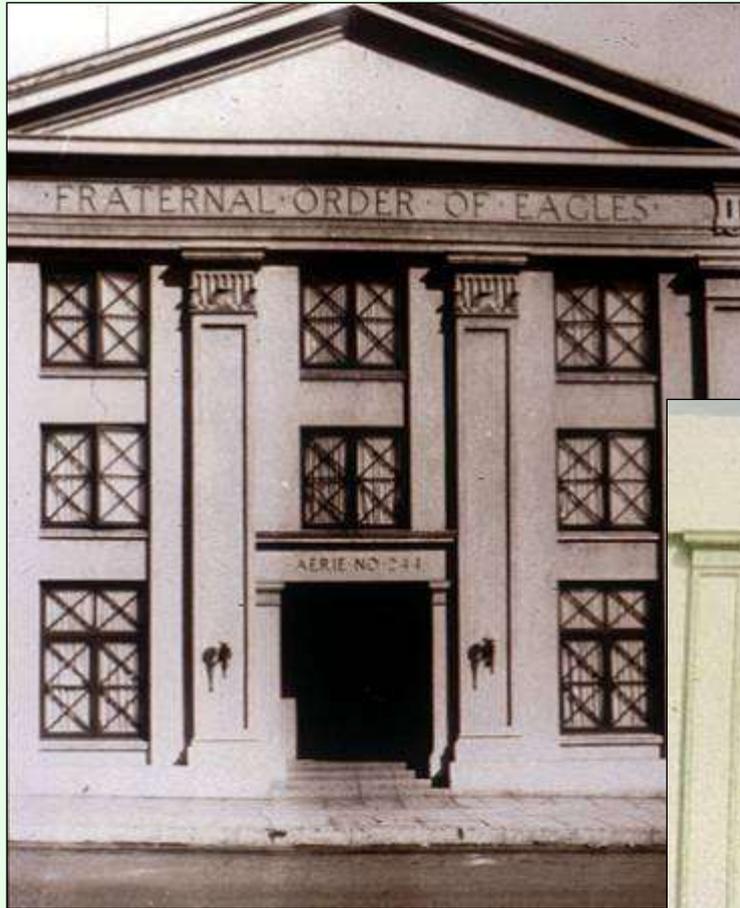
A photograph of the Florida State Capitol building in Tallahassee, Florida. The building is a grand, white, neoclassical structure with a prominent central dome. It is surrounded by lush greenery, including tall pine trees and a well-maintained lawn. A paved walkway leads towards the building. The sky is clear and blue.

# Standard 3

# Recognize Historic Period

# Standard 3 - Historic Period





## Standard 3 - Historic Period



## Standard 3 - Historic Period



A large, white, multi-story building with a central portico supported by columns, surrounded by a green lawn and trees. The building has a classical architectural style with a prominent central entrance. The foreground features a paved walkway, a black lamppost, and several large, cylindrical planters with greenery. The sky is clear and blue.

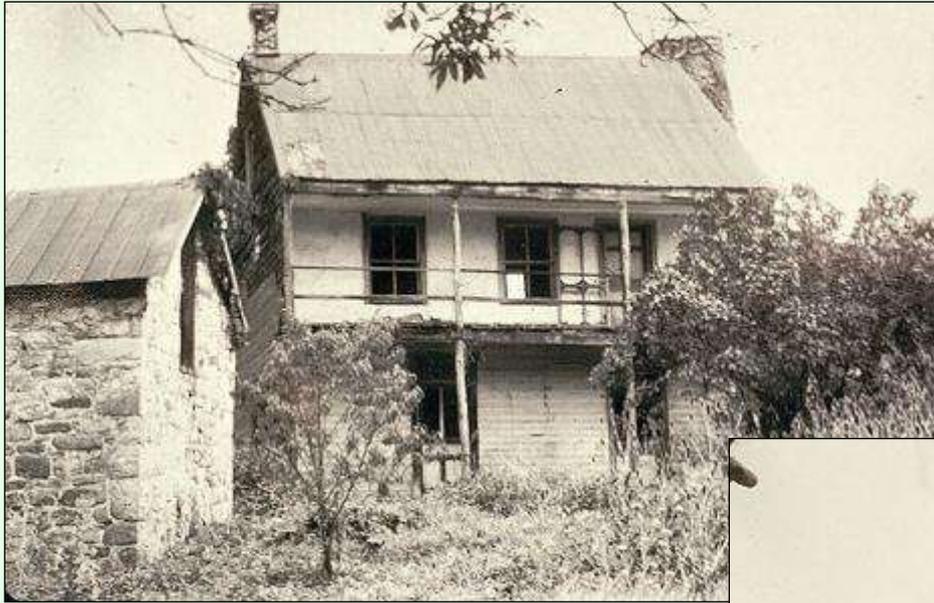
# Standard 4

**Retain and Preserve  
Significant Changes**

## Standard 4 - Acquired Significance



# Standard 4 - Acquired Significance





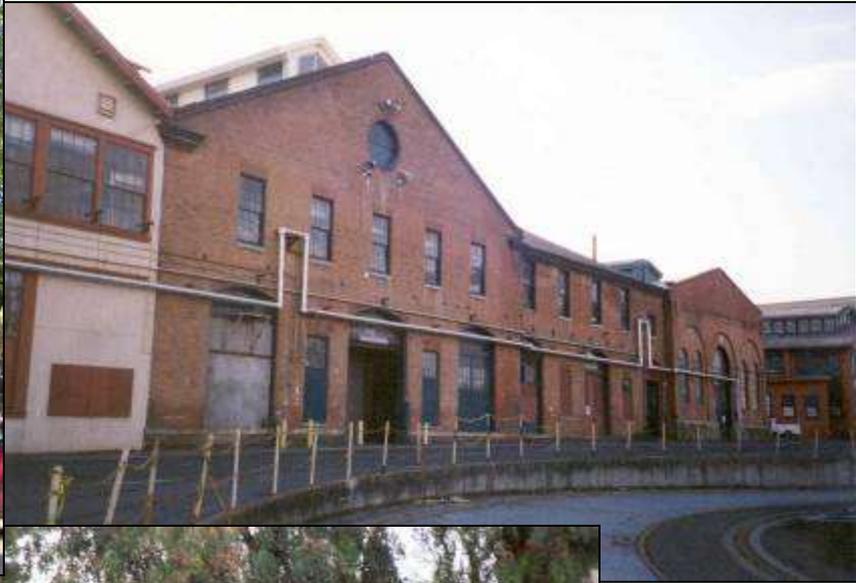
# Standard 5 - Distinctive Features / Craftsmanship



# Standard 5 - Distinctive Features / Craftsmanship



# Standard 5 - Distinctive Landscape

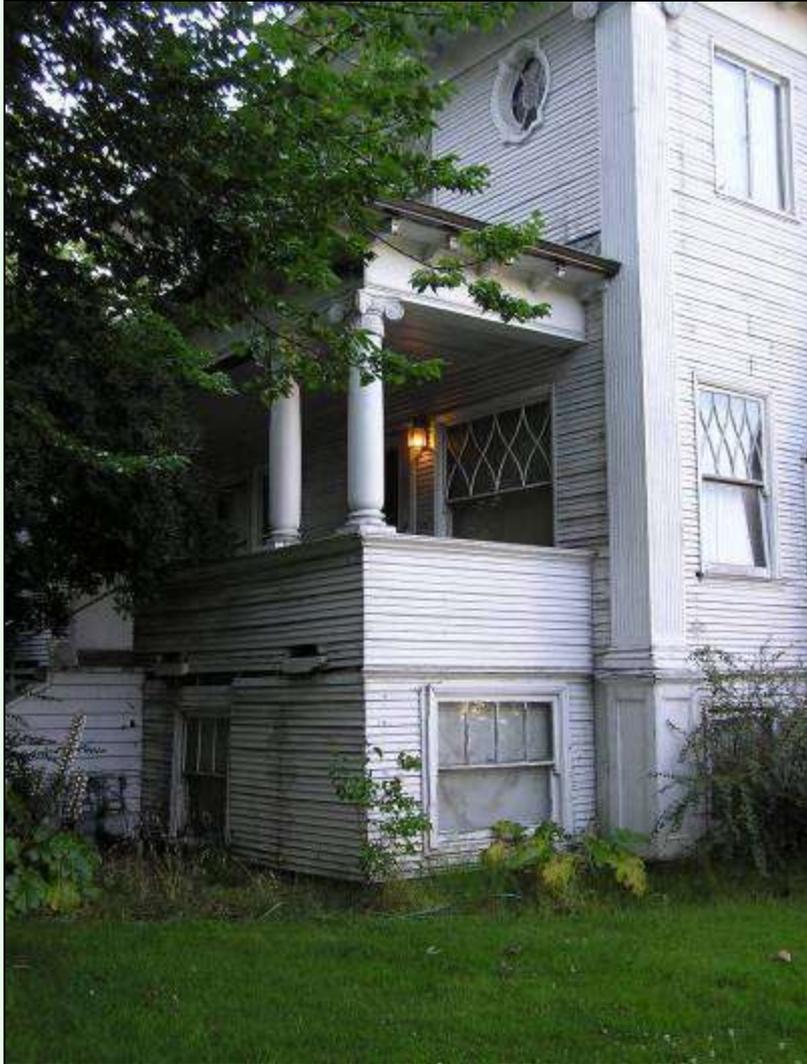


# Standard 6

## Repair Rather Than Replace Deteriorated Historic Features



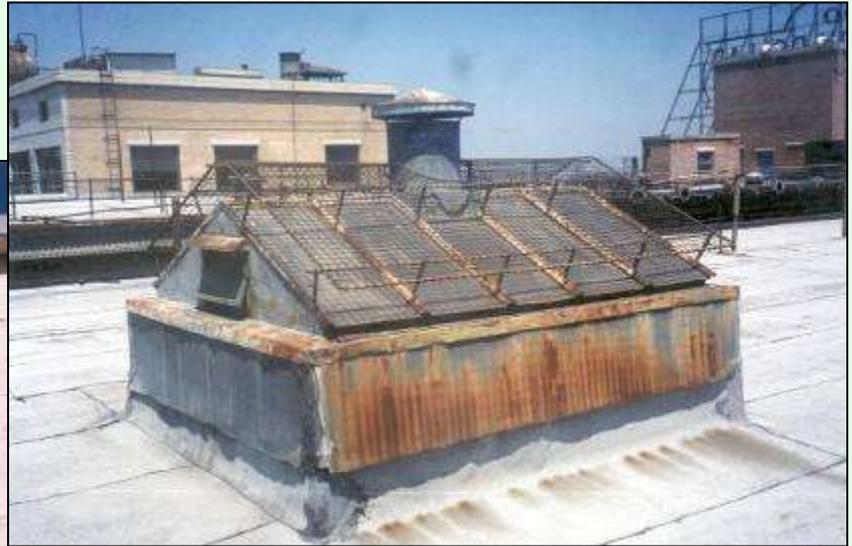
# Standard 6 - Repair / Replace



# Standard 6 - Repair / Replace



# Standard 6 - Repair

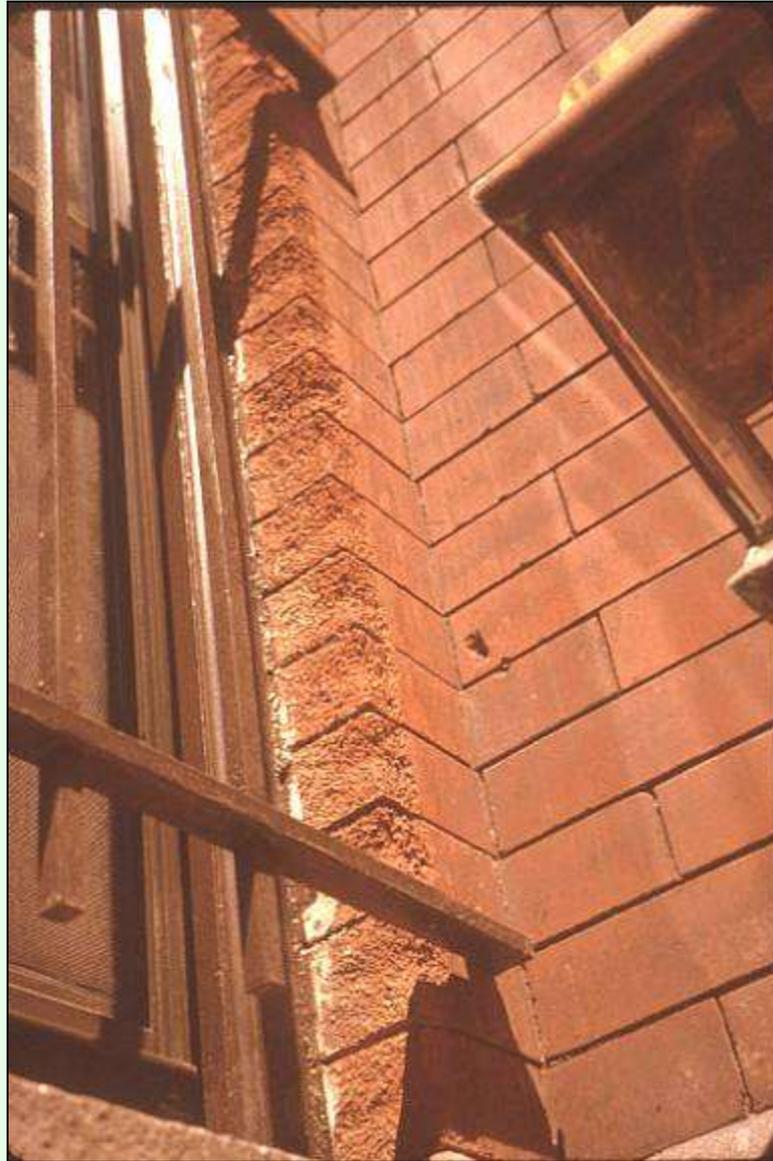


# Standard 7

**Clean Using Gentlest  
Means Possible**



## Standard 7 - Cleaning



## Standard 7 - Cleaning



## **Standard 8**

# **Protect And Preserve Archeological Resources**



# Standard 8 - Archeology



# Standard 8 –Archeology





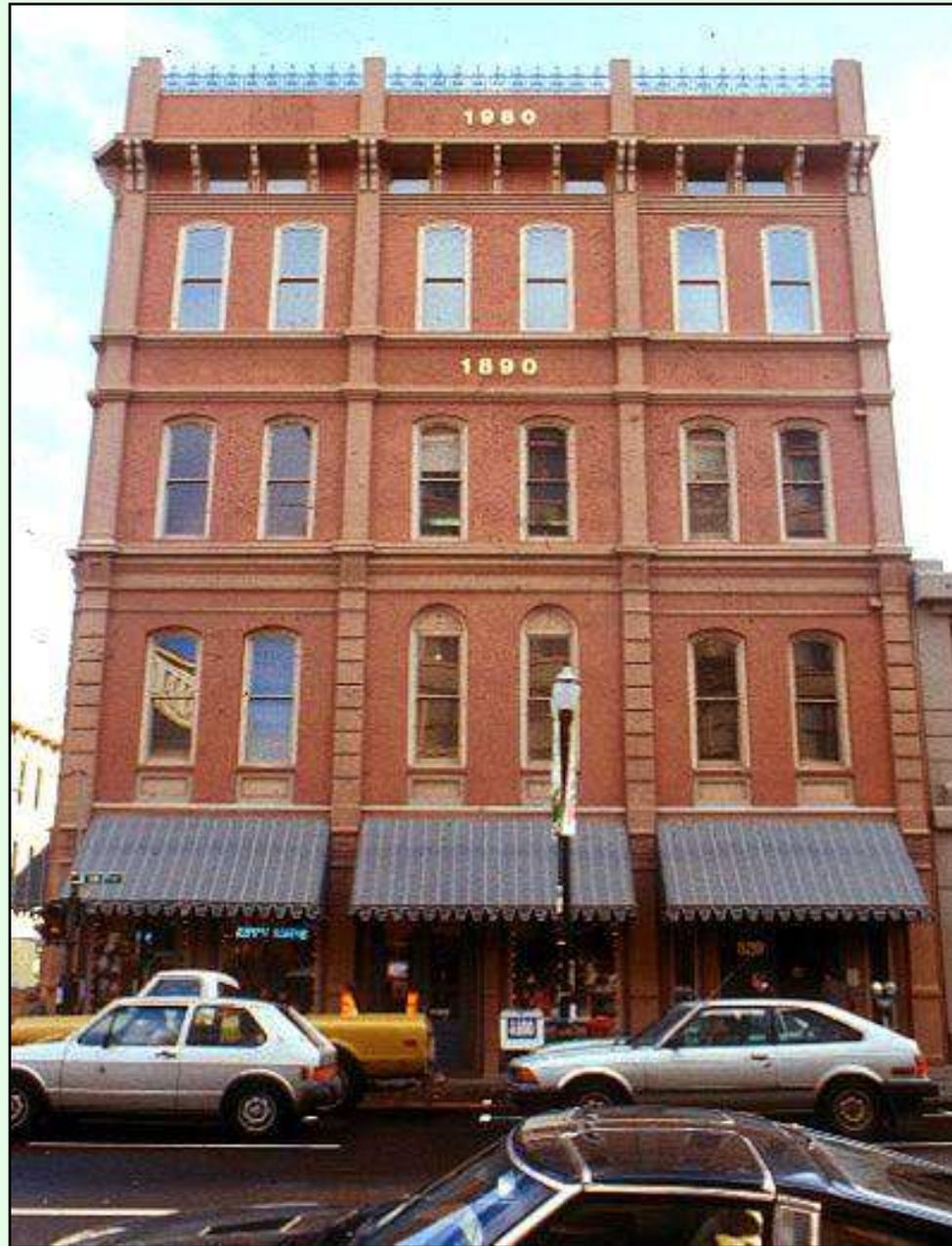
**Standard 9**  
**Compatibility**

**Standard 10**  
**Reversibility**

# New Additions



# New Additions



# New Additions





**New Additions**



**New Additions**

# **Neighborhood Considerations**

- **Context**
- **Codes and Regulations**
- **Features**
- **New Construction**



## Use and Type



Context



## Size and Massing



Context

# Scale



Context

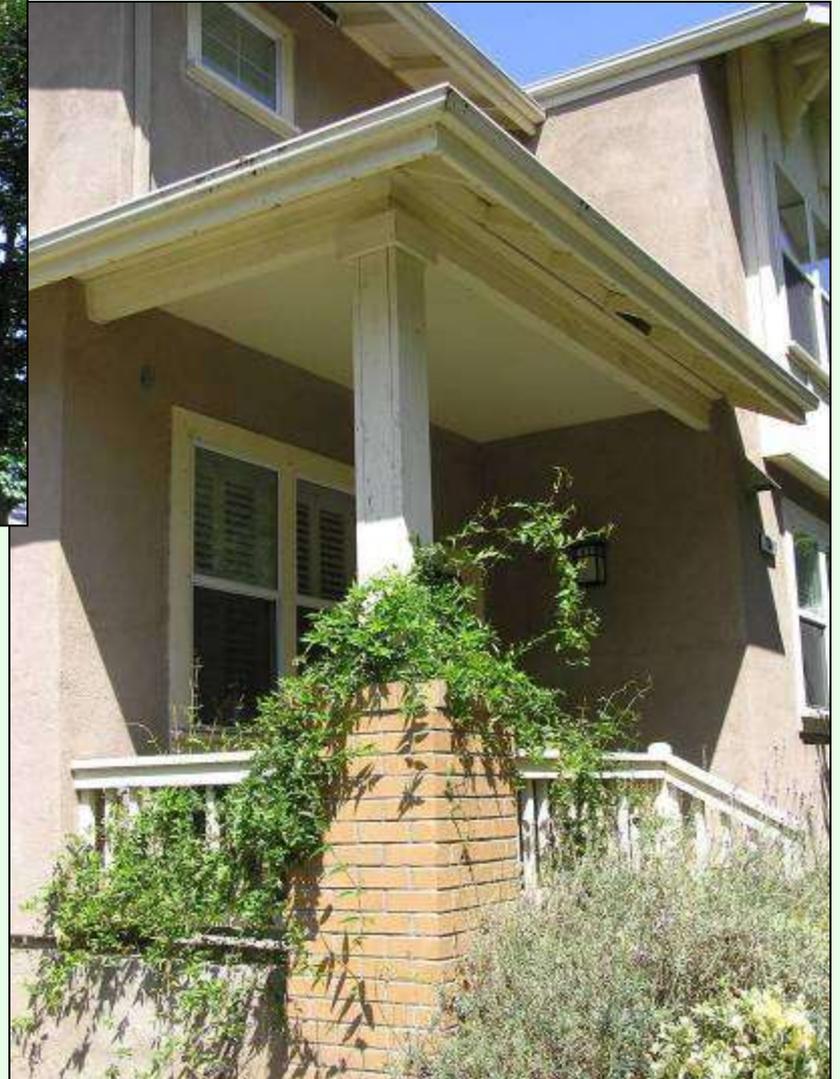


## Style and Context



Context

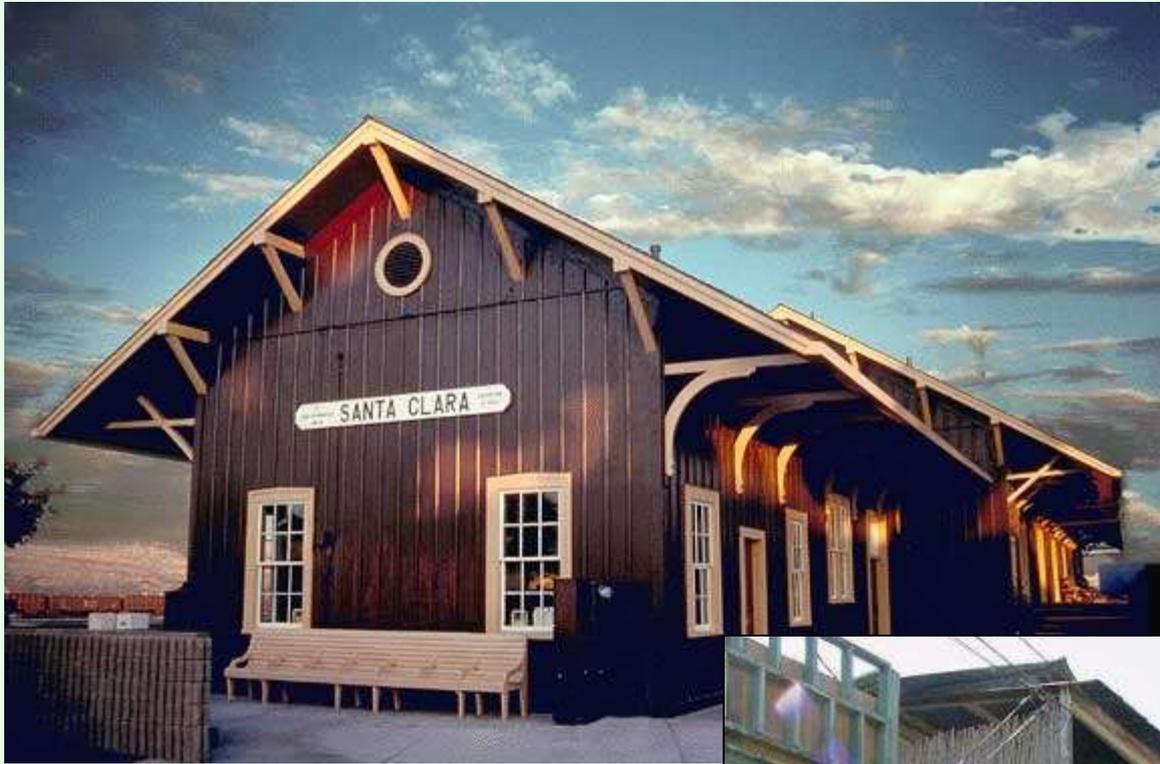
# Materials



**Context**

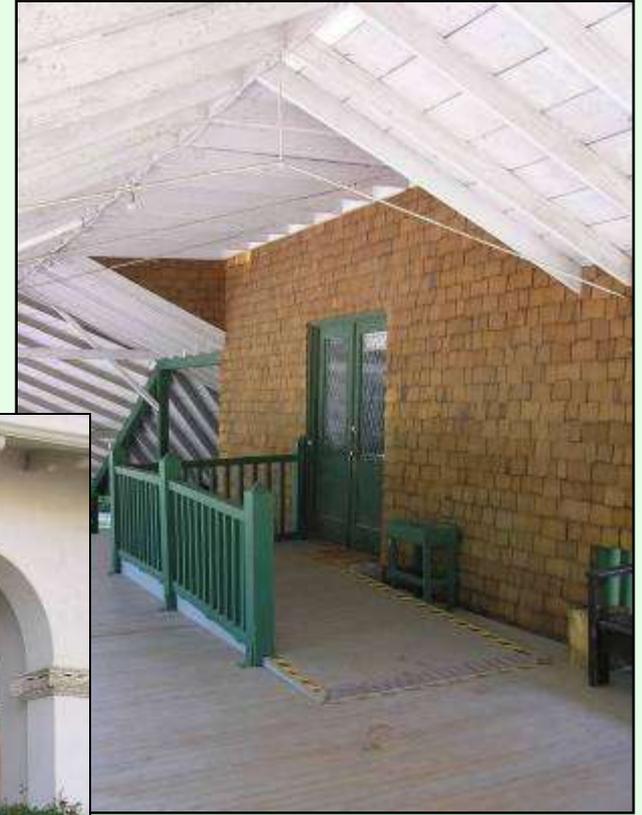
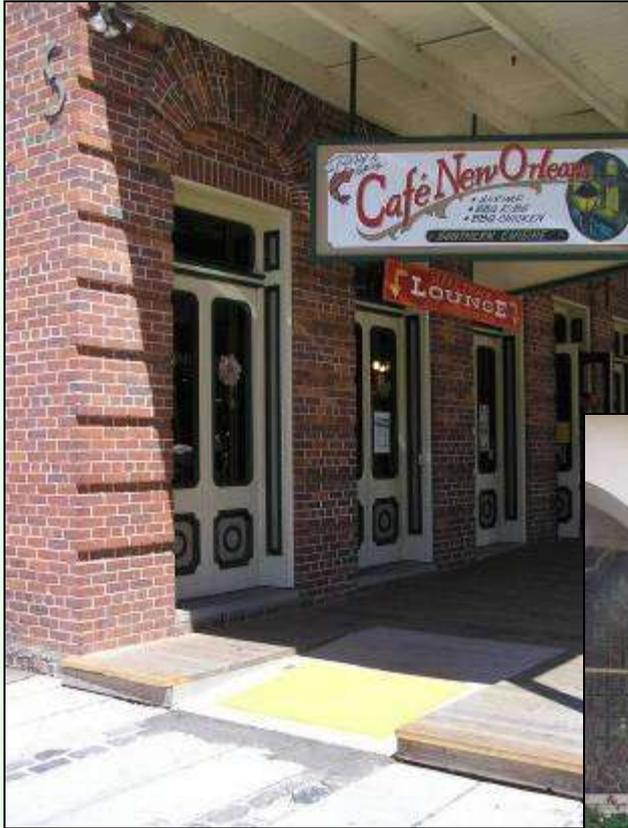
# Code-required work





**Energy efficiency**

**Codes and Regulations**



## Accessibility

Codes and Regulations



**Codes and Regulations**

## **DISABLED ACCESS TAX CREDIT (26 USC 44)**

Small businesses - ADA related eligible access expenditures

Not for new construction. Limited to existing facilities that are required to comply with ADA

Amount of credit equal to 50% of eligible access expenditures in a year, up to a max. cost of \$10,250. No credit for first \$250 of expenditures. Maximum tax credit, therefore, is \$5,000.

Eligible: Business that for previous tax year had either revenues of \$1 M or less or 30 or fewer full-time workers. For architectural adaptations, equipment acquisitions, and services/sign language interpreters, readers.

## **EXPENDITURES TO REMOVE ARCHITECTURAL AND TRANSPORTATION BARRIERS TO THE HANDICAPPED AND ELDERLY (26 USC 190)**

Deduction established to help businesses of any size with the removal of architectural or transportation barriers

**Work must comply with applicable accessibility standards**

**The amount of the deduction is a maximum of \$15,000 per year and used by any business**

**Can be used for architectural or transportation adaptations**

Architectural barriers are physical features that limit or prevent people with disabilities from obtaining the goods or services that are offered. Include narrow parking spaces, a step or steps to an entrance or sales area of a store, round doorknobs or other hardware difficult to grasp, narrow aisles, high counters, and fixed tables and chairs.



## Design Guidelines

Codes and Regulations

# Entrances



Features



## Windows



**Gables**

**Features**



## Dormers

Features

# Storefronts



Features



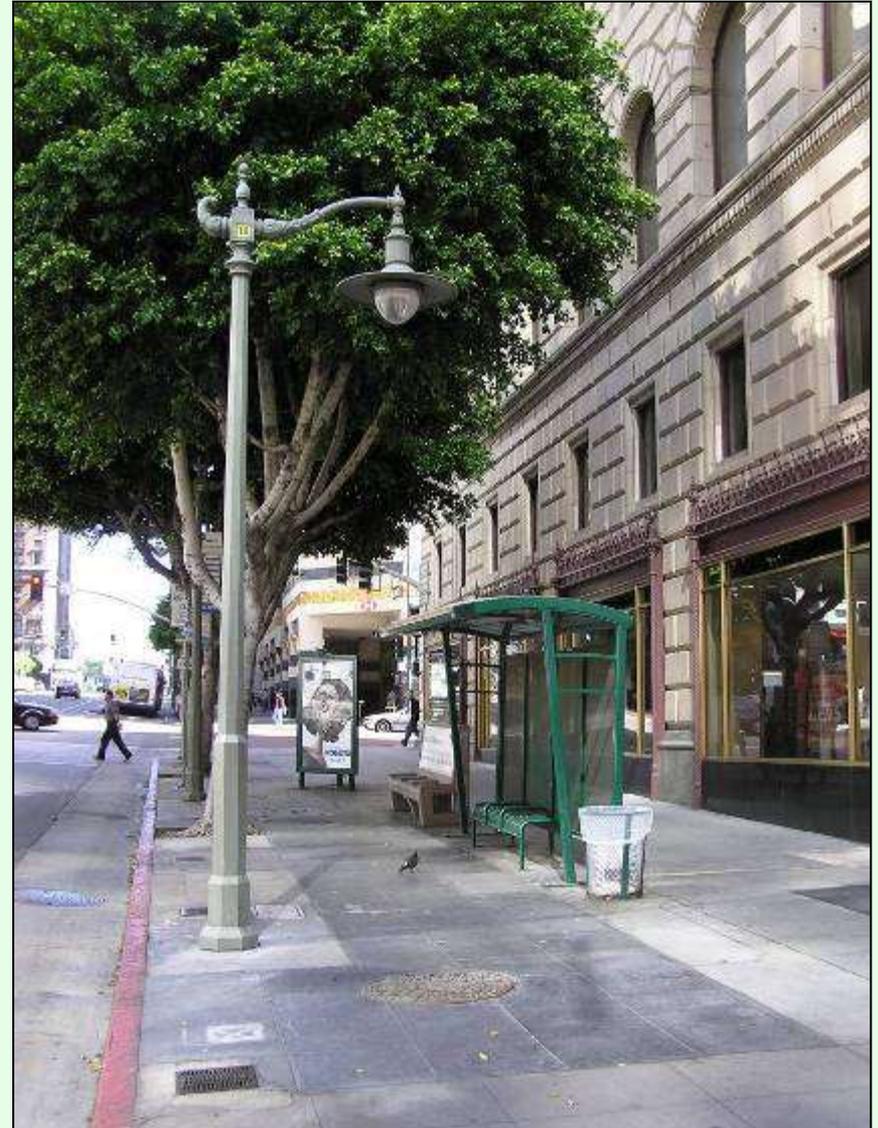
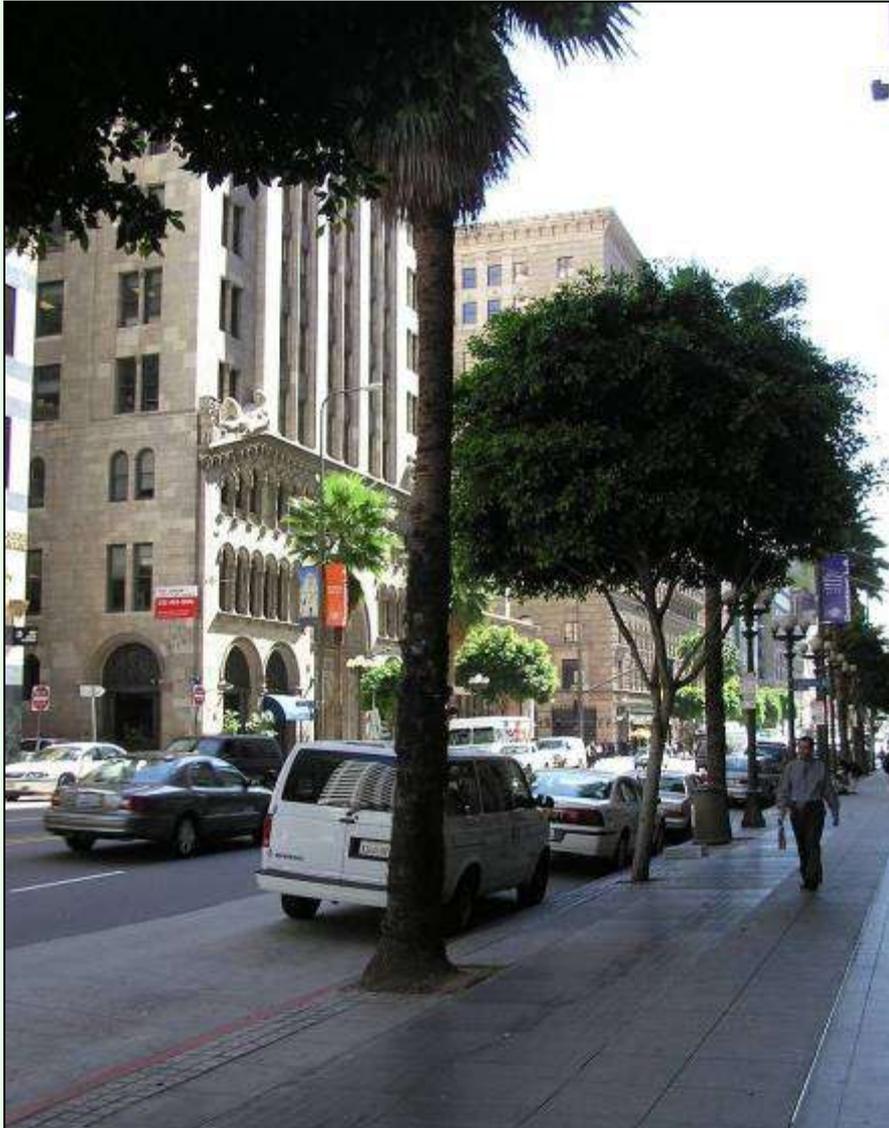
Features

# Residential Front Yard Improvements



**Street Features**

# Commercial Sidewalk Improvements

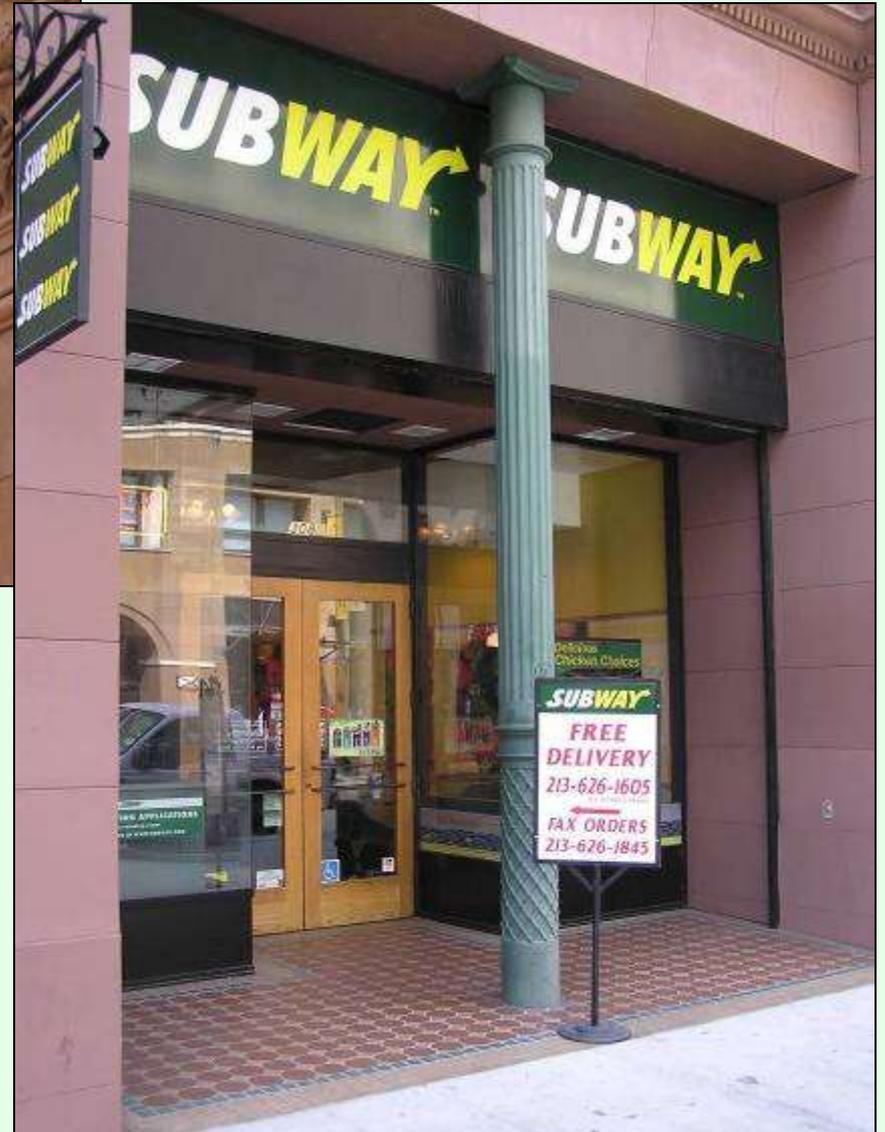




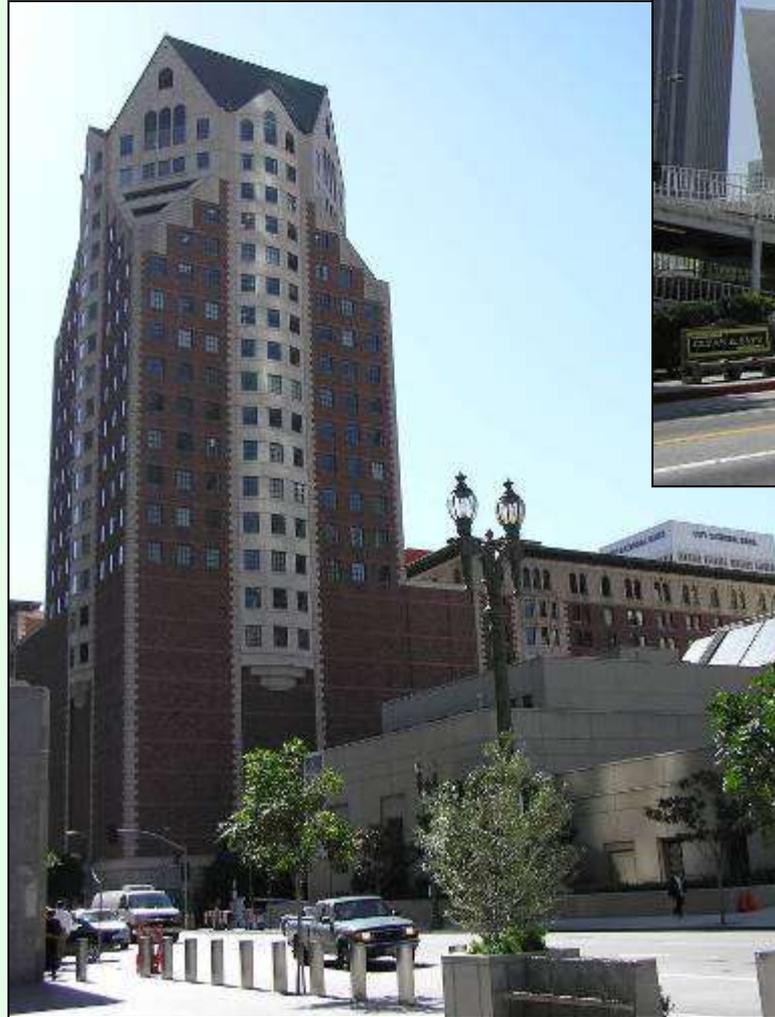
**Street Features**



**Signage**



**Street Features**



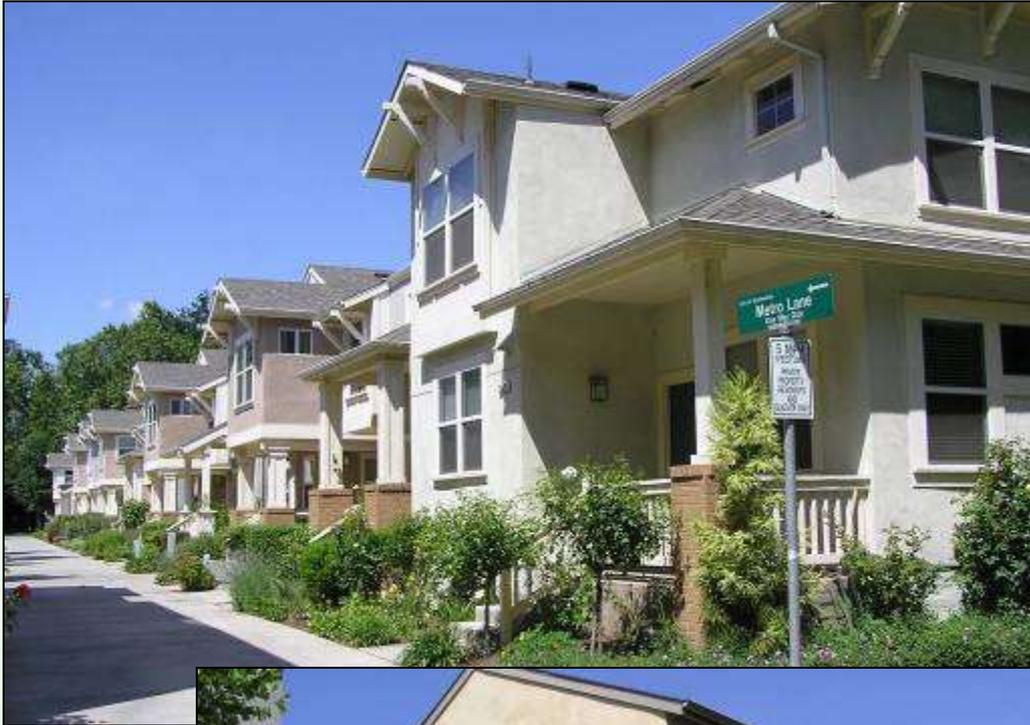
## New Construction



**Infill**



**New Construction**



**New Construction**



**Additions**



**New Construction**



**New Construction**

# Adaptive Reuse and New Related Construction



**New Construction**

# Related New Construction and Adaptive Reuse



**New Construction**

## **For More Information:**

- Guidelines for Preserving, Rehabilitating, Restoring & Reconstructing Historic Buildings
- California Historical Building Code
- Americans with Disabilities Act (ADA)
- Incentives for Historic Properties
  
- Office of Historic Preservation:  
[www.ohp.parks.ca.gov](http://www.ohp.parks.ca.gov)
- National Park Service:  
<http://www.nps.gov/history/hps/tps/tax/>